15 May 1968

MEMORANDUM FOR: CIA Records Administration Officer

SUBJECT   : Agency Reports Management Program Outline

REFERENCE   : Speed letter from the CIA Records Administration
                   Officer dated 28 April 1968; on the above subject.

    1. Attached is an outline of a proposed Agency Reports Management
Program. This outline is forwarded in response to the above-referenced
speed letter.

    2. As you know, Mr. Arthur McCarrick, National Archives and Records
Service, and Mr. Max Garchik, FAA, had been contacted previously on the
subject of reports management. In addition:

        a. Mr. Charles E. Wiley
            Department of Agriculture

        b. Bureau of the Budget

        c. Mr. Jerome C. Burchard
            Civil Service Commission

        d. Mr. Robert E. Beets
            General Services Administration

        e. Betty Morton
            Internal Revenue Service

        f. Dr. William E. Dyess
            Veterans Administration

were contacted within the past two weeks for general background information
on the current state of the reports management art. These contacts were
also made on the recommendation of Mr. Arthur McCarrick, NARS, as being
knowledgeable sources. All individuals contacted were very helpful, and
some have provided background documentation. Dr. William E. Dyess has
perhaps the more comprehensive, management-oriented program. He is ac-
cumulating material on his program, and is setting up a date for the writer
to visit VA for a briefing in the VA system. Other preliminary research
was conducted as noted in the outline footnote references.

3. There were several points made in your speed letter which can be discussed more appropriately here than in the attached paper. These points are quoted for reference convenience.

a. One concern was: "What do we plan to do?"

This question apparently was asked in relation to the records creation problem. The attached outline covers reports management, which is only one element of records creation. But with regard to this element, the attached paper presents a plan of attack and outlines proposed actions in the area of reports management. This plan draws upon traditional reports management concepts, but also gives the proposed program a more progressive orientation, especially with regard to expected results.

b. Another query was: "What results do we expect?"

The results expected from a reports management program can be simply stated as control over a managerial tool, whereby management gets the information it needs, when it needs it, in a meaningful and understandable form. This is the more realistic pay-off for the program, but is an intangible in terms of cost. The reports management program directors in the Agencies contacted agreed that cost is a consideration but not a major factor in justifying or evaluating a program. However, producing reports at a minimum cost is an objective. Results could possibly be expressed more exactly if the scope of the problem were known. This aspect of the program is mentioned in footnote 11 in the attached paper. Also, a cursory check with the Planning and Control Section, SSS, revealed an estimated volume of several hundred recurring reports in the DDS organization. The forms catalog contains possibly as many as 1,000 forms which imply reporting requirements. Thus, it would follow that a reports management program would payoff, but the determination of the scope of application or benefits requires a further concentrated research effort. This is proposed in PHASE I of the attached outline.

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c. You also asked: "What are the specifics?"

The specifics of a reports management program are not only implied in all the proposed program phases, but are also covered in sufficient detail that should the overall plan be accepted, their implementation would follow in order. Also, the implementation of the program need not cause any unreasonable disruption of office routines. However, there could very well be some disruption of reporting systems and procedures as the program gets under way and its objectives are met.

4. There are several caveats that should be considered in the development, implementation, and administration of an Agency Reports Management Program, and these are: 1) the program should not be a token effort; 2) it will take time and people; 3) it needs a formalized structure with authority; and 4) once implemented, the program requires continued management.

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Attachment:

Agency Reports Management
Program Outline